



System for Award Management Data Access User Guide – v2.4

January 16, 2021



Table of Contents

TABLE OF CONTENTS	1
1 WELCOME TO SAM	2
1.1 WHAT IS SAM?	2
1.2 THE FEDERAL PROCUREMENT WORLD OF THE PAST AND FUTURE	2
1.3 WHO SHOULD USE SAM?	2
1.4 PUBLIC USER CAPABILITY	3
1.5 NAVIGATING SAM	3
2 USER MANAGEMENT IN SAM	4
2.1 CREATING AN ACCOUNT IN SAM	4
2.2 TYPES OF ACCOUNTS	4
2.2.1 <i>Creating a System Account</i>	5
2.2.2 <i>System Dashboard</i>	9
2.2.3 <i>System Profile</i>	9
2.2.4 <i>System POC Information</i>	10
2.2.5 <i>Deactivating Your System Account</i>	11
3 DATA ACCESS IN SAM	11
3.1 SAM DATA ACCESS ROLES	11
3.1.1 <i>Public Data</i>	12
3.1.2 <i>FOUO Entity Management Data</i>	13
3.1.3 <i>Sensitive Entity Management Data User</i>	13
3.2 REQUESTING DATA ACCESS ROLES	13
3.2.1 <i>Data Access Request for Individual Account</i>	14
3.2.2 <i>Data Access Request for System Accounts</i>	16
3.3 APPROVING DATA ACCESS REQUESTS	19
3.4 HOW TO ACCESS DATA FOR WHICH YOU HAVE BEEN APPROVED	20
3.4.1 <i>Accessing Data from the Website</i>	21
3.4.2 <i>Accessing Data as Extracts</i>	21
3.4.3 <i>Accessing Data Using SFTP or Web Services</i>	22
4 SAM HELP	25
4.1 SAM HELP PAGES	25
4.2 SAM ASSISTANT TOOL	26
5 ABOUT SAM	26
5.1 ABOUT PAGES	26
APPENDIX A – ACRONYM LIST	26

**This user guide addresses the current production SAM.gov capabilities which combined the former Central Contractor Registration (CCR) system, CCR's Federal Registration (FedReg) module, the Online Representations and Certification Application (ORCA), and the Excluded Parties List System (EPLS).



1 Welcome to SAM

1.1 What is SAM?

The General Service Administration's (GSA) Office of the Integrated Award Environment (IAE) is consolidating the government wide acquisition and award support systems into one new system—the System for Award Management (SAM). SAM is streamlining processes, eliminating the need to enter the same data multiple times, and consolidating hosting to make the process of doing business with the government more efficient.

1.2 The Federal Procurement World of the Past and Future

Automation of the federal procurement and awards processes has evolved over time through development of systems to perform individual steps in the process. Paper-based systems and business processes were automated as the internet became widely available. These systems were adopted across the Federal Government and are now managed under one organization. The Integrated Award Environment (IAE) manages these systems and their system capabilities have been organized around six key functional areas. See Table 1.1.

Table 1.1: IAE Functional Areas

Functional Area	Capabilities	Legacy Systems
Entity* Management	Register/Update Entity core data Manage certifications / representations	CCR/FedReg – Central Contractor Registration/Federal Agency Registration ORCA – Online Representations and Certifications Application
Award Management	Post solicitation and award data Maintain government-wide contract award data Manage government-wide subcontractor data	FBO – Federal Business Opportunities FPDS-NG – Federal Procurement Data System-Next Generation eSRS/FSRS – Electronic Subcontracting Reporting System/FFATA Subaward Reporting System
Wage Data	Access wage determinations	WDOL – Wage Determinations Online
Performance Information	Manage/maintain past performance information Manage exclusion list	PPIRS/CPARS/FAPIIS – Past Performance Information Retrieval System EPLS – Excluded Parties List System
Support	Provide security/access control Provide reporting/communications support Provide internal controls	

*For the purposes of this capability area, *Entity* refers to prime contractors, organizations or individuals applying for assistance awards, those receiving loans, sole proprietors, corporations, partnerships, and any Federal Government agencies desiring to do business with the government.

1.3 Who Should Use SAM?

SAM is used by anyone interested in the business of the Federal Government, including:



- Entities (contractors, federal assistance recipients, and other potential award recipients) who need to register to do business with the government, look for opportunities or assistance programs, or report subcontract information;
- Government contracting and grants officials responsible for activities with contracts, grants, past performance reporting and suspension and debarment activities;
- Public users searching for government business information.

1.4 Public User Capability

SAM includes information of various sensitivity levels. Public data is available to search and view without having to log in or register for a SAM account. Information that was previously publicly available in the legacy systems has been moved to SAM—and will remain publicly available in SAM. Public users that want to save their searches or government users needing access to higher levels of sensitive data must register for a SAM user account. For more information on obtaining a SAM user account, see [User Management](#).

1.5 Navigating SAM

SAM provides a standardized format across all web content pages making it easy to navigate and find information. There are several persistent areas in SAM.gov that can be found in the same location on every page of the system.

- **Banner** – Found across the top of each SAM.gov page. You can use the banner to log in or out of the system, access the Login.gov FAQs page, and access the SAM homepage.
- **Navigation Bar** – Each page in SAM.gov contains a main navigation bar along the top of the screen. The tabs navigate you to your SAM Home, Search Records, Data Access, Check Status (for the SAM Status Tracker), About, and Help pages.
- **Back Button** – While navigating SAM.gov, the back button on your web browser is disabled. To move from page to page, you will need to use either the navigation bar or the Previous button.

Figure 1.1: SAM Navigation



The Navigation Bar allows you to access different sections of SAM.

- **HOME/MY SAM** – once you log into to SAM, HOME changes to MY SAM. The MY SAM navigation link gives you access to all the actions you may perform based on your user role.
- **SEARCH RECORDS** – allows you to perform quick or advanced full text searches with or without an account. Without an account, you will only be able to see publicly available information.



- **DATA ACCESS** – provides details for accessing SAM data via Pipe-Delimited downloads. It provides access to various types of extracts in three subsections: Public Extracts, EM (Entity Management) Extracts, and Exclusions Interfaces. This section also includes General Data Access Information. For more information, see [Data Access](#).
- **CHECK STATUS** – allows you to quickly check an entity's registration status in SAM by entering a DUNS Number or CAGE Code. The SAM Status Tracker will show you the current status of the entity associated with that DUNS Number or CAGE Code, as well as tell you what steps are left to complete based on why they are registering.
- **ABOUT** – provides key information about SAM, news and announcements that may provide valuable information for you, and contact information associated with SAM. For more information, see [About](#).
- **HELP** – provides useful information on SAM such as User Guides, FAQs, informational videos, and external resources. This should be the first place to check if you have any SAM related questions. For more information, see [Help](#).

On most pages in SAM, you will find a Navigation Panel on the left side of the page. The Navigation Panel contains a list of links to help you navigate to different pages within that SAM tab. For example, if you are on the Help tab, the Navigation Panel allows you to navigate to pages for FAQs, User Guides, International Registrants, Demonstration Videos, Exclusions Information, and External Resources.

2 User Management in SAM

In this section, you can learn about the different types of user accounts in SAM, how to create a system account, and what you can do with a SAM system account. You can also read about the permissions that you can have in SAM. Before reading on, note that mandatory fields are marked with an asterisk (*) to help you understand what data is required.

2.1 Creating an Account in SAM

Anyone can create a user account in SAM. A user account provides you access to SAM functionality such as saving search queries, requesting roles for Government employees, and requesting access to non-public information.

2.2 Types of Accounts

There are two types of SAM user accounts: individual accounts and system accounts.

An **individual account**:

- Contains your own user information.
- May stay with you even when your role in your organization or the permissions you need to do your job change.

Just because you have a user account does not mean you have the ability to create or edit records. To do those activities, you must have roles with an entity. With an account, Federal Government employees can also request access to view sensitive data through search. If you wish to use SAM



web services or access SAM extract data directly through the SFTP server, you will need to create a SAM system account. As of February 01, 2019, users with individual accounts will not be able to use web services or access the SFTP server.

A system account:

- Represents a particular information technology (IT) system.
- Is primarily for systems which need to automate the pull of SAM data through extracts or web services.
- Is useful if multiple users in your organization need to access the same extract or web service.

2.2.1 Creating a System Account

To create a new system account:

- Select Log In on the SAM homepage.
- Complete all required authentication steps via login.gov.
- Note that the email address you use to create and authenticate your login.gov account will be your SAM System Account email address. You will NOT be able to edit this email address in SAM.
- Once you complete the login.gov authentication, select Continue to return back to SAM.



Figure 2.1: Log In to SAM

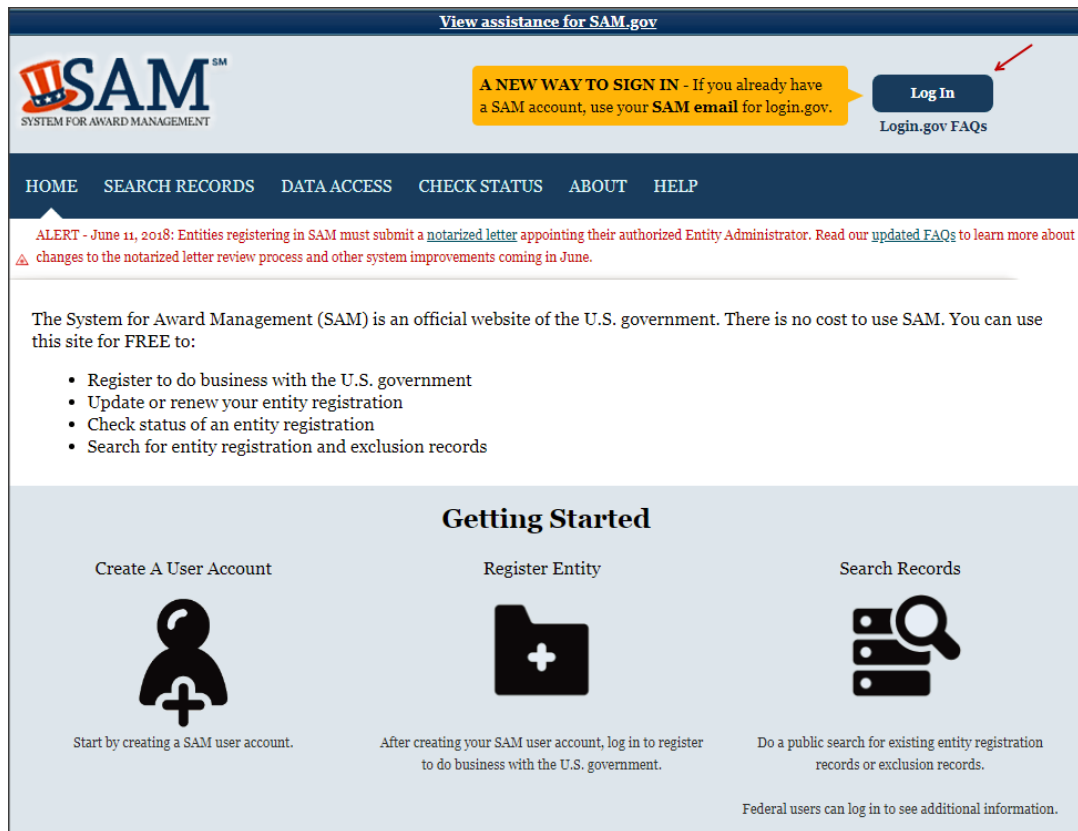



Figure 2.1: Create an Account

View assistance for Create an Account--Choose Account Type



SYSTEM FOR AWARD MANAGEMENT

HOME CREATE AN ACCOUNT

ALERT - June 11, 2018: Entities registering in SAM must submit a [notarized letter](#) appointing their authorized Entity Administrator. Read our [updated FAQs](#) to learn more about changes to the notarized letter review process and other system improvements coming in June.

Create an Account

Choose Account Type

Page Description

You have successfully created a login.gov account. There is no SAM user account that matches the profile you created. If you have an existing SAM account, you will need to update your login.gov profile with the email address used in SAM. Otherwise, use the links on this page to create a new SAM account. You will need this account to manage entity registrations, exclusion records, request data access, and save searches.

Individual Account Details

Create an Individual User Account if you need to:

- Register or update your entity
- Create and manage exclusion records
- View For Official Use Only (FOUO) level data
- Save search criteria to run at a later time
- Request non-public data access as a Federal government user

Create Individual Account

System Account Details

Create a System User Account if you need to:

- Request non-public data access for a Federal government system
- Automate a system pull of non-public data
- Perform data transfer from SAM to your Federal government system

Create System Account

- Select Create System Account on the Create an Account page.
- SAM asks you if your system account is for a U.S. Federal Government Agency. Select your answer and select Next.
- Enter the organization information for your system. Select Next. This is the entity that maintains the system. All fields are mandatory. You must enter:
 - Department/Agency Name
 - Entity/Organization Name
 - Street Address
 - City
 - State/Province
 - ZIP
 - Country
- After entering your entity's information, enter details about your system on the System Information page.



- Enter your System Implementation Name and System Name Abbreviation.
- The System Account email address will be pre-populated based on the account you created and authenticated via login.gov. This field will NOT be editable. To change the email address, you will need to update your login.gov account. This email address will be used for SAM communications. It is recommended that you use a shared email address that is specific to your system and not a personal email address. This allows your system account to continue to receive SAM communications even if a specific employee leaves your organization. You cannot use an email address that is used by another account in SAM.
- Enter either an IP address or domain name for your system.
- Enter an IP address if you anticipate requesting SFTP/Sensitive Entity Management Data User access.
- After entering the account information, select Next.

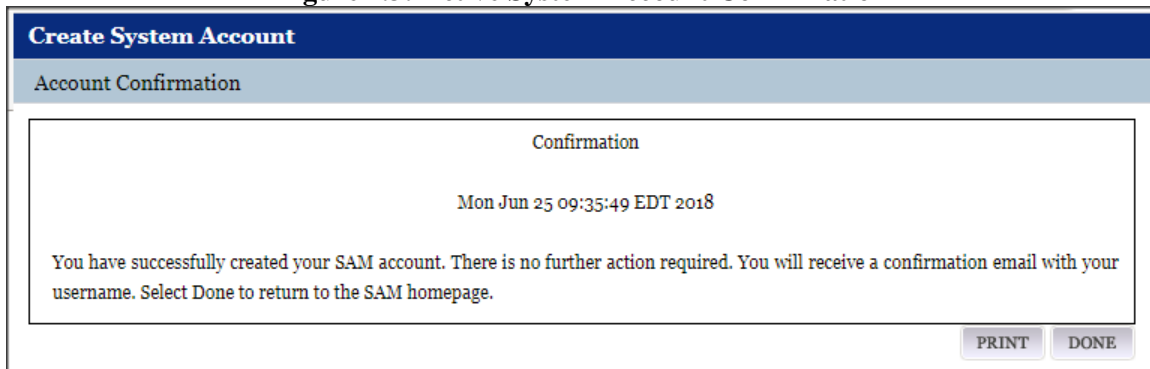
SAM generates your username for you based on the information you entered and displays it on the Create Password page. NOTE: You will only need this username if your system retrieves data from SAM via web service or SFTP.

- Create your password and select Next to continue. NOTE: Your password will expire after 365 days and the password must contain:
 - At least eight characters total (but no more than fifteen characters are allowed)
 - At least one number
 - At least one letter
 - At least one special character (but not the & symbol)
- Next enter Points of Contact (POC) for your system. These POCs can perform activities associated with the account such as making Data Access Requests or calling the SAM Help Desk for assistance with the account. You must enter at least one POC, and you can enter up to three. To add additional POCs, select Add POC and select Next to continue. For a POC, you must provide:
 - First and Last Name
 - Email Address
 - Phone Number
- On the Summary page, review the information entered. Select Edit to modify any information. Once you have reviewed the information, select Submit.

Once you submit, your system account will automatically be active. You do not need to take any further action. You will receive a confirmation email from SAM.gov. Once you submit your account data you will see the screen in Figure 2.3.



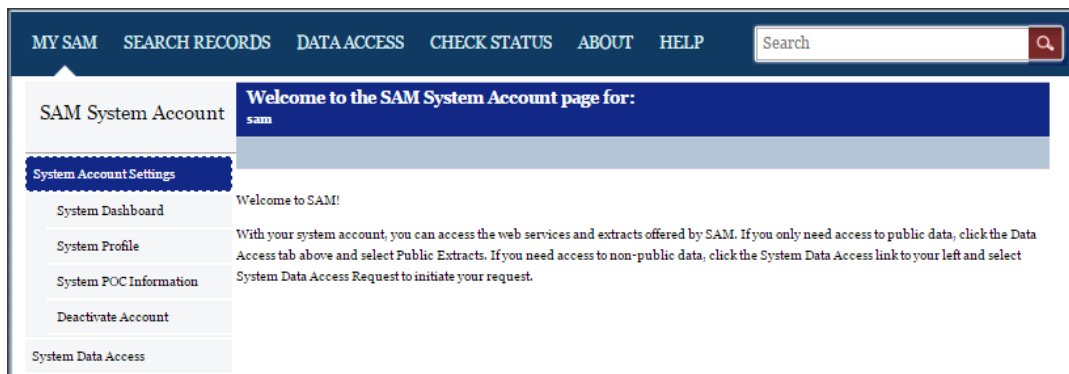
Figure 2.3: Active System Account Confirmation



2.2.2 System Dashboard

When you log in to your system account, the first page you see is your System Dashboard. This is the centralized location for all the functionality you need access to in SAM. When you are logged into your account, you can always access this page by selecting the My SAM tab in the navigation bar.

Figure 2.4: System Dashboard Page



On the left side of the page are your navigation links. These give you access to the functionality you need to do your job. Each header contains a list of processes and pages. Select a header to see the links underneath.

2.2.3 System Profile

At any point, you can modify your account's information:

- From the sub navigation panel, select System Profile under the System Account Settings.
- Select Edit for the section that you want to modify.
- Modify the data and select Save.

NOTE: You cannot modify your system account email address, username, or your answer to the U.S. Federal Government Agency question.



To change the system account password:

- Select Change Password. This opens a new page.
- Enter the current password.
- Next, enter the new password and confirm the new password. The new password should be different than the previous ten passwords used in SAM, and should conform to the password requirements:
 - At least eight characters total (but no more than fifteen characters are allowed)
 - At least one number
 - At least one letter
 - At least one special character (but not the & symbol)
- Select Save to activate your new password.

2.2.4 System POC Information

POCs can perform activities associated with the account such as making a Data Access Request or calling the SAM Help Desk for assistance with the account.

SAM system accounts may have up to three points of contact (POC). Keeping POCs on your SAM system account updated is very important. Only a POC is allowed to request a higher level of access to SAM data.

2.2.4.1 Updating System Account POCs

To update your system account POCs:

- From the sub navigation panel, select System POC Information under System Account Settings.
- If you have multiple POCs, select the POC that you wish to edit to expand that section.
- Edit the fields as appropriate.
- Select Save in the bottom right corner of the page to save your changes.
- If you wish to add additional POCs, select Add POC.
- If you add additional POCs, you can also delete them by selecting Delete for that particular POC.

2.2.4.2 Resetting a System Account Password

Contact the Federal Service Desk if you need help updating your system account password. You must provide the following information from your current system account:

- SAM System Account Username, e.g. sammycwsprod25
- Previous System POC(s) First Name/Last Name/Email Address



- System Name, e.g. My Contract Writing System
- System Account Email Address, e.g. mycws@myagency.gov

If the information you provide matches what is in your System Profile, a Tier 2 Technical help desk member will send a password reset email to the System Account Email Address. You must select the link and change your password. We then recommend you update your POC information to add three System POCs to ensure future continuity of operations.

If you cannot provide the validation information above, you will have to create a new Data Access Request and go through the complete approval process.

After you change your password, make sure all system processes which are using your old password have been updated. Without doing this, it is possible that a single process may repeatedly attempt to access SAM with your old password, resulting in your system account being locked out.

2.2.5 Deactivating Your System Account

If you know you will not use SAM in any capacity in the future or if you do not wish to maintain your SAM account, you may choose to deactivate your SAM account. When you do this, any [Data Access Roles](#) that you have will be permanently removed, and your account will be in inactive status.

- From the sub-navigation panel, select System Account Settings, then Deactivate Account.
- You may optionally specify a reason for the deactivation to assist the SAM Program Office in its administrative efforts.
- Select Next.
- Confirm that you wish to deactivate your account by selecting Deactivate. This will complete the process.

To reactivate your account, contact the [SAM Help Desk](#).

3 Data Access in SAM

3.1 SAM Data Access Roles

With the consolidation of multiple legacy systems, SAM has redesigned how you gain access to data. SAM has grouped data based on sensitivity level and functional area into a Data Access Role. By having a certain Data Access Role, you have access to the data that you need in a variety of formats. Data Access Roles give SAM accounts the ability to view non-public data through search (similar to how CCR Tools worked).

You must submit a [Data Access Request](#) to receive a Data Access Role. You must be either a Federal Government employee or a Federal Contractor working on behalf of an agency to submit a request. Regardless of the role you request, you will need to provide contact information for the Government Sponsor/Supervisor and Government Security Official in charge of approving your



Data Access roles. The SAM Program Management Office has the final say on all Data Access Requests.

NOTE: If you are accessing SAM while logged in with your SAM account that is tied to a government email address, you automatically have access to *viewing FOUO fields on the website*. You **do not** have access to FOUO extracts or web services. You must specifically request these roles in order to gain access to FOUO extracts and/or web services.

Table 3.1: SAM Role Definitions

SAM Role	Definition
No SAM Account	A user that has not created a SAM user account. Public access only.
Authenticated User	A user that has created a SAM user account but may not have any higher roles.
FOUO Entity Management Data User	A user that may download FOUO extracts containing registration data for non-public entities, FOUO POCs, D&B Linkage, D&B Monitoring, and size metric information.
Sensitive Entity Management Data User	A user that has access on screen or via extract/web service registrants' FOUO information plus Taxpayer Identification Number and banking information for Electronic Funds Transfer.

The table below provides an example of what extracts and web services are available to users with certain roles.

Table 3.2: SAM Role-to-Access Matrix

SAM Role	SAM Extract	SAM Web Service
No SAM Account	Entity Management Data Package Public	No web service access
Authenticated User	Entity Management Data Package Public	Entity Management Web Service Public
FOUO Entity Management Data User	Entity Management Data Package FOUO	Entity Management Web Service FOUO
Sensitive Entity Management Data User	Entity Management Data Package Sensitive	Entity Management Web Service Sensitive

3.1.1 Public Data

In SAM, you can view certain data without needing approval. You can always search for public information through SAM's [Search](#) feature. You can also access the following extracts and web services without a Data Access Role:

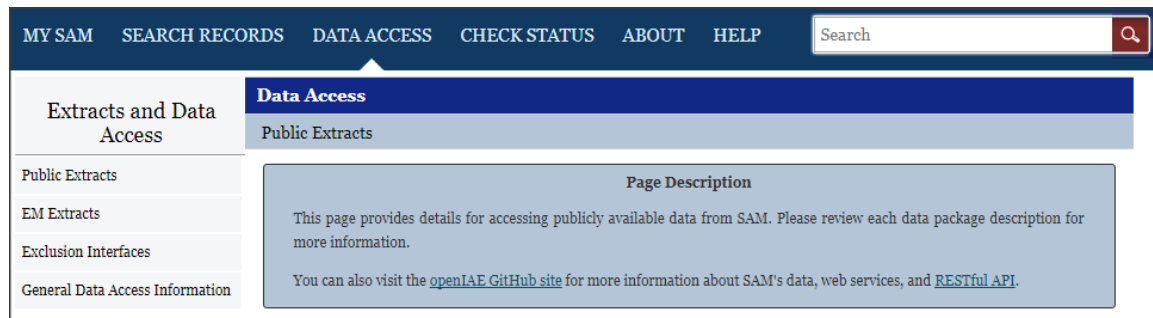
- *Entity Management Extracts Public Data Package:* This data package contains all entity registrations registered in SAM that are publicly available under the Freedom of Information Act (FOIA).
- *Exclusions Extract Data Package:* This data package contains the publicly available data for all active exclusion records entered by the Federal government identifying those parties excluded from receiving Federal contracts, certain subcontracts, and certain types of Federal financial and non-financial assistance and benefits.



- [Exclusion Search Web Service](#): This web service allows users to customize exclusion searches based on their desired criteria.

To learn more information about accessing these public web services/extracts select the Data Access tab on the SAM homepage.

Figure 3.1: Data Access Information



3.1.2 FOUO Entity Management Data

A Federal Government user that has created a SAM user account will automatically have the ability to view FOUO Entity Management data within the website after they log in with their account.

As a Federal Government user, you can access FOUO entity data such as the Taxpayer Identification Number and Annual Revenue on SAM.gov. You also have the ability to view entities that have opted out of public search and those Federal Government entities registered for Intra-Governmental Transactions (IGT). If you wish to access FOUO entity data via web services and/or data extracts, you must submit a data access request form, regardless if you are a Federal government user or not.

3.1.3 Sensitive Entity Management Data User

With this role, you can access Sensitive entity data such as an entity's financial information as well as all Entity Management FOUO data.

If you have the Sensitive Entity Management Data User role, and you are logged into your individual SAM account, you can view Entity Management Sensitive data through SAM's Search.

3.2 Requesting Data Access Roles

If you need a [Data Access Role](#), you can request one through SAM. You need a system account to submit a request. Receiving a requested role allows the account to access data through the SAM.gov website, by downloading the extract packages, or through the web services.

When requesting data access roles, you will be shown your currently assigned data access roles and their expiration dates on the Select Data Access Role page. The information will be located directly above the data access role dropdown selection.

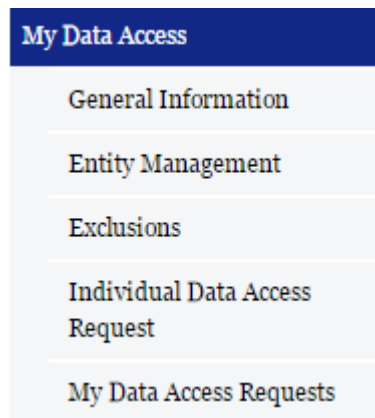


3.2.1 Data Access Request for Individual Account

If you have an individual SAM account, to request a [Data Access Role](#):

- Log in to your individual SAM account.
- On your My SAM page, select Individual Data Access Request underneath My Data Access.

Figure 3.2: Data Access Links



- On the Select Data Access Role step, you can find more information about Data Access. Scroll to the bottom of the page and select the Data Access Role that you want to request.
- Select your user type: Government User or Federal Contractor. Select Next.

Figure 3.3: Data Access Role Request

- On the Requestor Information page, provide your Job Title. The remaining information is pre-populated from your profile information. Select Next to continue. If you want to change your profile information, cancel out of this process and select Edit User Information underneath My Account Settings on your My SAM page.
- On the Entity Information page, enter your entity's details. This is the entity where you work. This information provides context for your request. You must provide:
 - Entity Name
 - Street Address
 - City
 - State/Province
 - ZIP/Postal Code (only mandatory if country is United States)



-
- Country
 - **Approver Information:** Complete the requested information for the individuals that are approving your request. You must provide information for the following approvers: Government Supervisor/Sponsor and Government Security Official. When you submit a Data Access Request, these individuals will receive an email with a link to either approve or reject your request. These approvers do not need to have SAM accounts. All requests will be automatically sent to the SAM PMO for final approval. Select Next to continue.
 - The Government Supervisor/Sponsor is the person in the government who can provide the initial approval for your request. You must provide your supervisor/sponsor's:
 - First and Last Name
 - Job Title
 - Email Address (As of March 2014, the required government email addresses include the following domains: .gov, fs.fed.us, .mil, dodea.edu, usuhs.edu, fbiacademy.edu, and si.edu)
 - Phone Number
 - The Government Security Official is your government information security official. This is often the person responsible for your annual privacy and information security training. You must provide:
 - First and Last Name
 - Email Address (the required government email addresses include the following domains: .gov, fs.fed.us, .mil, dodea.edu, usuhs.edu, fbiacademy.edu, and si.edu)
 - On the Request Justification page, provide a reason for the request. Approvers will use this information to make a decision on your request. Your justification may be no more than 500 characters. To speed up the approval process, provide the following:
 - What you plan on using the data for.
 - Who else in your entity will be using the data and why are they using it.
 - Select Next. Review the information on the Summary page and ensure all the details are correct before submitting the request. Before submitting your Data Access Request, you can view the Data Access Agreement from which you agree to abide by if your request is approved. Select the link to open a PDF of the agreement.



Figure 3.4: Individual Account Data Access Agreement Form

My Data Access Request: Individual

Request Justification

Page Description

Please provide a justification for this data access request. This information will be used by the approvers you listed, as well as by the GSA data approver, to determine whether to approve your data access request. Include the following in your request justification:

- Describe your Federal mission requirement
- Explain how you will use the data
- If the request is to load data into a system, include the name of the Federal government system that will contain the data

Request Justification example: I am a financial specialist and need to confirm registrants' banking information in order to make payments on contracts or grants awarded. I will view the registrant data on-screen as part of my contract preparation process to confirm the Taxpayer Identification Number in their registration matches what I have in my files. I need to maintain our vendor tables in our contract writing system using SAM data. We rely on daily updates to ensure contract accuracy.

If you plan to download extracts, you can access them directly from the website in the SAM Data Access section. Alternatively, automated systems may request access to the extracts via our Secure File Transfer Protocol (SFTP) server.

Request Justification
(maximum 500 characters):*

Character Count : 0

CANCEL

PREVIOUS

NEXT

- Select Submit. SAM now sends your request to your first approver. If your request is rejected at any point, SAM will send you a notification. Once it is approved, you will also receive a notification.

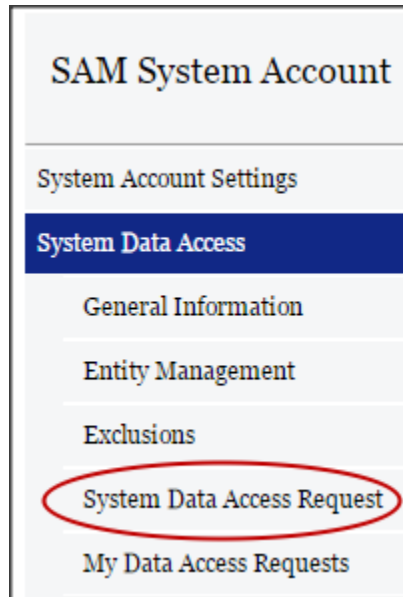
If you try requesting a Data Access Role while another request is pending for the same role, you will receive the following error message: “You already requested this level of Data Access. If you need a different Data Access Role, please select Cancel and choose a different role.” Users cannot submit a new request until the current request is approved or rejected.

3.2.2 Data Access Request for System Accounts

If you have a SAM system account, to request a [Data Access Role](#):

- Log in to your SAM system account.
- On your SAM System Account page, select System Data Access Request underneath System Data Access.

Figure 3.5: System Data Access Request



- On the Select Data Access Role step, you can find more information about Data Access. Scroll to the bottom of the page and select the Data Access Role that you want to request.
- Select your user type: Government User or Federal Contractor. Select Next.

Figure 3.6: Data Access Role Request

The Entity Management Public Extract, Legacy CCR Public ("FOIA") Extract, and Exclusions Extract contain public data for which you do not need to request access.

Data Access Role:

[CANCEL](#)

[NEXT](#)

- **Approver Information:** Complete the requested information for the individuals that are approving your request. When you submit a Data Access Request, these individuals will receive an email with a link to either approve or reject your request. These approvers do not need to have SAM accounts. All requests will be automatically sent to the SAM PMO for final approval. Select Next to continue.
- The Government Supervisor/Sponsor is the person in the government who can provide the initial approval for your request. You must provide your supervisor/sponsor's:
 - First and Last Name
 - Job Title
 - Email Address (the required government email addresses include the following domains: .gov, fs.fed.us, .mil, dodea.edu, usuhs.edu, fbiacademy.edu, and si.edu)



-
- Phone Number
 - The Government Security Official is your government information security official. This is often the person responsible for your annual privacy and information security training. You must provide:
 - First and Last Name
 - Email Address (the required government email addresses include the following domains: .gov, fs.fed.us, .mil, dodea.edu, usuhs.edu, fbiacademy.edu, and si.edu)
 - On the Request Justification page, provide a reason for the request. Approvers will use this information to make a decision on your request. To speed up the approval process, provide the following:
 - What you plan on using the data for.
 - Who else in your entity will be using the data and why are they using it.
 - Choose whether or not you require SFTP access to get extracts.
 - Select Next. Review the information on the Summary page and ensure all the details are correct before submitting the request. Before submitting your Data Access Request, you can view the Data Access Agreement form, which you agree to abide by if your request is approved. Select the link to open a PDF of the agreement.



Figure 3.7: System Account Data Access Agreement Form

Page Description

Please provide a justification for this data access request. This information will be used by the approvers you listed, as well as by the GSA data approver, to determine whether to approve your data access request. Include the following in your request justification:

- Describe your Federal mission requirement
- Explain how you will use the data
- If the request is to load data into a system, include the name of the Federal government system that will contain the data

Request Justification example: I am a financial specialist and need to confirm registrants' banking information in order to make payments on contracts or grants awarded. I will view the registrant data on-screen as part of my contract preparation process to confirm the Taxpayer Identification Number in their registration matches what I have in my files. I need to maintain our vendor tables in our contract writing system using SAM data. We rely on daily updates to ensure contract accuracy.

If you plan to download extracts, you can access them directly from the website in the SAM Data Access section. Alternatively, automated systems may request access to the extracts via our Secure File Transfer Protocol (SFTP) server.

Request Justification
(maximum 500 characters):*

Character Count : 0

If you plan to download extracts, indicate whether or not you wish to pull the extracts from the SAM Secure File Transfer Protocol (SFTP) server. Select No if you are downloading extracts directly from the Data Access section of the SAM website or if your system will only use the SAM web services. Select Yes if you wish to pull extracts via SFTP.

☐ Yes, I need access to the SAM SFTP server

☐ No, I do not need access to the SAM SFTP server

- Select Submit. SAM now sends your request to your first approver. If your request is rejected at any point, SAM will send you a notification. Once it is approved, you will also receive a notification.

If you try requesting a Data Access Role while another request is pending for the same role, you will receive the following error message: “You already requested this level of Data Access. If you need a different Data Access Role, please select Cancel and choose a different role.” Users cannot submit a new request the current request is approved or rejected.

3.3 Approving Data Access Requests

If you have been listed as an approver for a Data Access Request, you do not need to create a SAM account to approve the request. To make a decision on the request:



- Select the link in the email that you received from SAM.gov. This takes you to the request.

You can view the specifics of the Data Access Request (such as requester information, requested [Data Access Role](#), and Justification Reason) by selecting the Original Request link on the left side of the page.

- If you have been identified as the Government Sponsor/Supervisor, select Government Sponsor/Supervisor Approval along the left side.
 - Select your decision from the drop down and provide the reason for your decision. Provide sufficient detail here so that either another approver or the requester can understand your decision.
- If you have been identified as the Government Security Official, select Government Security Official Approval.
 - You must provide your Job Title and Phone Number.
 - If you are approving a Government User's request For Official Use Only (FOUO) data, you must also provide the requestor's Information Security Awareness Training Completion Date (which must be within the past 365 days).
 - Select your decision from the drop down and provide the reason for your decision. Provide sufficient detail here so that either another approver or the requester can understand your decision.
 - As the Government Security Official, you also have the ability to view the information entered previously by the Government Sponsor/Supervisor by selecting Government Sponsor/Supervisor Approval. You cannot edit this information.
- Once you have made your decision, select Next.
- On the Summary page you can review the information that you entered. Select Submit to confirm your decision.

If you approve the request, it will be sent to the next approver. The user's requested [Data Access Roles](#) will not become active until the SAM PMO approves the request. If you reject the request, you must enter a justification reason as to why this request is being rejected. The reject reason will be included in the email to the user.

3.4 How to Access Data for Which You Have Been Approved

Once your request has been approved:

- Log in to your SAM account and expand the Data Access navigation menu.
- You will see links to the Entity Management and Exclusions pages.
- A list of your Data Access Roles in each category is available at the top of the screen on each page, and the respective extracts are available for you to download below.

For each extract, supporting documentation is provided to help you get started with the interface.



NOTE: Information is provided for all extracts but you can only access those for which you have been approved.

3.4.1 Accessing Data from the Website

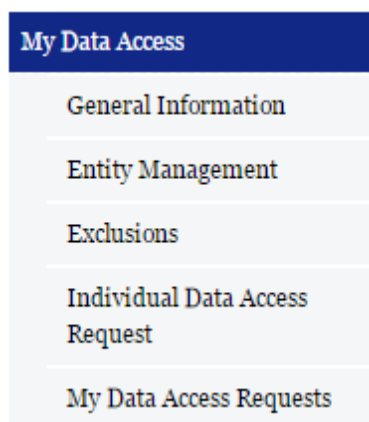
Once your request is approved, the data will automatically populate on the appropriate SAM pages. For example, when viewing an entity registration, data for which you have been approved will be displayed on the screen along with the rest of the record. This is similar to the SAM Entity Management Extract Tools functionality and is only available for an individual account. You must login to your SAM account in order to see the non-public data.

3.4.2 Accessing Data as Extracts

To access an extract, follow the instructions listed in the interface documentation [here](#).

- If you have a SAM account, all interface documentation can be found by logging into your account and selecting either Data Access (if individual) or System Data Access (if system).
- If you do not have an account and only want to access public extracts, select on the Data Access link on the navigation bar to access the Data Access Information section. From this page, you can download the monthly Entity Management Public Data files and the daily Exclusions Extracts Daily Package.
- If you have an account with an approved role to access FOUO or sensitive extracts, please log into SAM and select My Data Access from the sub-navigation menu. From here you can access the Entity Management Data or Exclusion Data.

Figure 3.8: Data Access Information



- For Entity Management files, select the Entity Management link under the My Data Access section of the sub-navigation menu. Based on the role and the permissions that have been approved for your account, you will have access to the daily or monthly files for SAM Entity Management Extracts.
- For the Exclusions files, select the Exclusions link.



3.4.3 Accessing Data Using SFTP or Web Services

After you are approved for your SAM role, you will receive an email from the SAM data administrator providing you with specific information on your role and interface access instructions.

SAM offers two primary web services depending on user needs.

- For users seeking information about SAM entities, SAM offers the Entity Management Web Service.
- For users seeking information about SAM exclusions, SAM offers the Exclusion Search Web Service.
- You may also retrieve data extracts via [SFTP](#).

Please log in with your SAM System Account and select the System Data Access link in the sub-navigation menu. Under the About section you can find additional information about the Data Access process. Under the Entity Management and Exclusions links, you can find sample files of the Pipe-Delimited files for Entity Management and Exclusions for the data access level that you have been approved for. Please review these documents and format your SFTP downloads as needed.

3.4.3.1 SAM Entity Management Web Services

The SAM Entity Management web service is a B2B (Business-to-Business) web application that accepts user-customized requests from a client application for SAM information on one or multiple records and then returns the requested data in real time, using the XML format. This web service is geared towards Federal users needing information about entities registered with SAM that wish to do business with the Federal government.

For more information on how to use the Entity Management web service please consult the tutorial [here](#).

To develop and connect your system, please use the WSDL and Endpoint below:

- WSDL: <https://gw.sam.gov/SAMWS/1.0/Entity?wsdl>
- Endpoint: <https://gw.sam.gov/SAMWS/1.0/Entity>

3.4.3.2 SAM Exclusion Web Services

The Exclusion Search Web Service replaces the EPLS web service and allows users to perform searches for public exclusion information. No SAM username or password is required.

To develop and connect your system, please use the WSDL and Endpoint below:

- WSDL: <https://gw.sam.gov/SAMWS/1.0/ExclusionSearch?wsdl>
- Endpoint: <https://gw.sam.gov/SAMWS/1.0/ExclusionSearch>

3.4.3.3 Accessing SAM Extracts via SFTP

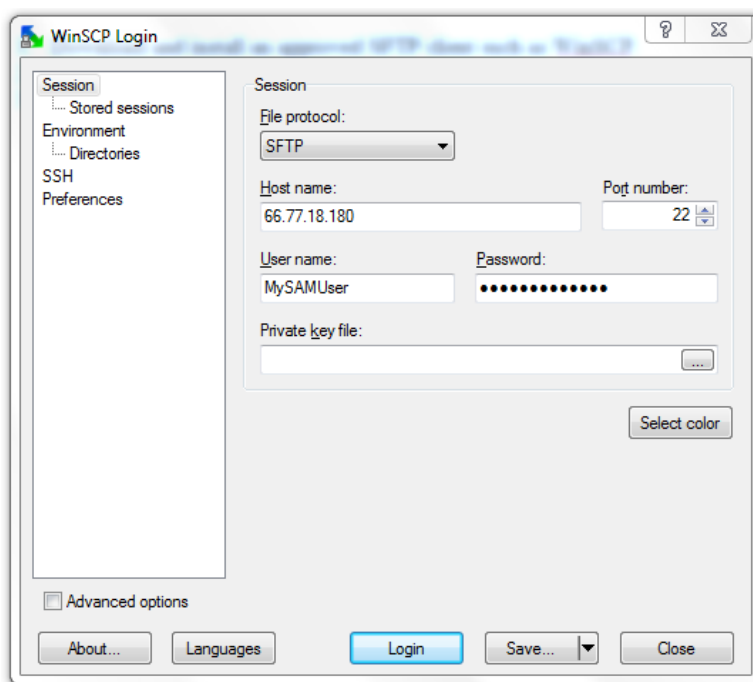
SAM has an alternate download option for downloading extracts other than from the SAM website. Access to the SAM server is available via SFTP protocol with an approved SFTP client such as WinSCP, Filezilla, or PSFTP. Please note that GSA does not provide technical support for the SFTP clients mentioned. These are merely examples of clients that have successfully connected to SAM. SFTP access is reserved for SAM system accounts as it is intended for systems, such as contract writing systems, to automatically download SAM extracts. Individual users may download extracts directly from the SAM website.

Extracts on SAM SFTP Servers:

- Entity Management Public Data Package
- Entity Management FOUO Data Package
- Entity Management Sensitive Data Package
- Exclusions Extract Data Package

To exchange your Public Key and IP address, please contact the [Federal Service Desk](#) at 866-606-8220.

Figure 3.9: SFTP Protocol



- Log into the SAM SFTP site.

Figure 3.10: Authentication Banner



Note: If you do *not* receive a Notice to Users message then firewall configurations within your network are blocking your connection. If you are unable to connect, after seeing the Notice to Users message, please contact the Federal Service Desk at 866-606-8220.

Refer to the directory structure below to navigate to the Extract you need. For example, if you need SAM Entity Management Sensitive files, navigate to the /current/SAM/3_Sensitive_V2 folder. You will only be able to access the contents of folders that your account has been given permission to view.

Table 3.3: Extract-to-SFTP Folder Mapping

Extract	Folder Path
SAM Entity Management Public	/current/SAM/1_PUBLIC
SAM Entity Management FOUO	/current/SAM/2_FOUO
SAM Entity Management Sensitive	/current/SAM/3_SENSITIVE_V2
SAM Exclusions Public	/current/SAM/ExclusionsPublicExtract

For additional security, we recommend that SFTP-enabled systems use public key authentication. Directions on how to create and exchange your system's public key can be provided by the SAM Help Desk.



4 SAM Help

4.1 SAM Help Pages

On the SAM Help pages you can find the training materials and information you need to successfully navigate SAM. SAM Help includes:

- **User Guides:**
 - **Quick Start Guides.** There are several Quick Start Guides that provide data access overview information on how to search SAM, create exclusions, and perform administrator roles.
 - **Full User Guides.** There are three separate user guides to help familiarize you with SAM. The guides are for federal users, non-federal users, and users consuming non-public data through SAM's data access request process.
 - **Helpful Hints.** There are helpful hints for entity registrations, government users, and public users:
 - Understanding your entity's registration status
 - Government User Guidance on Small Business Information in SAM
 - Government User - Identifying Excluded Entities in SAM
 - Identifying Entities Registered for Contracts
 - Identifying Entities Registered for Grants
 - Public User - Identifying Excluded Entities in SAM
- **International Registrants.** There are resources specific to international entities, or those located outside of the United States and its outlying areas. This page includes a Quick Start guide, Helpful Hints, video on obtaining NATO CAGE (NCAGE) Codes, and External Resources for international registrants.
- **Exclusions Information:**
 - *Agency Exclusion POC.* Listing of all Agency Exclusions Point of Contacts with their name and phone number
 - *Legacy CT codes.* Full listing and definition of all historical Cause and Treatment codes.
 - *Exclusion Types.* Full listing and description of the SAM Exclusion Types and how they map to the historical Cause and Treatment codes
- **External Resources.** Links to software sites that you may need to access specific sections of SAM.



4.2 SAM Assistant Tool

The SAM Assistant Tool aids users with completing their registrations by providing page-level and field-level instructions, hints, and tips. In order to activate the SAM Assistant Tool, navigate to the top of the website and select “View Assistance for SAM.GOV.” If you want to hide the tool, you can select “Hide SAM Assistant.” The tool may appear at certain times during the registration process so if you prefer to disable the tool, select the checked box marked “Enable SAM Helper Tool” and the tool will become disabled.

5 About SAM

5.1 About Pages

The most recent updates and news will be in the About section. This section includes:

- **What is SAM:** Information about SAM and a quick overview to getting started.
- **News:** Information on the latest release notes, news and announcements about SAM.
- **Contact Us:** Information on how to contact the supporting service desk.

If you have a question about SAM or require assistance, select Contact Us for information on how to contact the SAM Help Desk, which is run by the Federal Service Desk (FSD). For policy related questions, contact your contracting officer or grants official.

URL: www.fsd.gov

Hours: 8am - 8pm (Eastern Time)

U.S. Calls: 866-606-8220

International Calls: 334-206-7828

DSN: 866-606-8220

Appendix A – Acronym List

Acronym	Acronym Description
ABA	American Banking Association
ACH	Automated Clearing House
ALC	Agency Location Code
AKA	Also Known As
ANSI	Alaskan Native Servicing Institution
ARO	Agency Registration Official (List)
CAGE	Commercial and Government Entity
CAPTCHA	Completely Automatic Public Turing Test to Tell Computers and Humans Apart
CCR	Central Contractor Registration
CFO	Chief Financial Officers
COTS	Commercial Off the Shelf



Acronym	Acronym Description
CPARS	Contractor Performance Assessment Reporting System
CSV	Comma Separated Value
CT	Cause and Treatment (Codes)
D&B	Dun and Bradstreet
DAR	Data Access Request
DBA	Doing Business As
DFARS	Defense Federal Acquisition Regulation Supplement
DO	Disbursing Office or Delivery Order
DOD	Department of Defense
DODAAC	Department of Defense Activity Address Code
DUNS	Data Universal Numbering System
EDI	Electronic Data Interchange
EDWOSB	Economically Disadvantaged Women-Owned Small Business
EFT	Electronic Funds Transfer
EIN	Employee Identification Number
EPA	Environmental Protection Agency
EPLS	Excluded Parties List System
eSRS	Electronic Subcontracting Reporting System
FAPIIS	Federal Awardee Performance and Integrity Information System
FAR	Federal Acquisition Requirement
FBO	Federal Business Opportunities
FedReg	Federal Agency Registration
FEMA	Federal Emergency Management Agency
FFATA	Federal Funding Accountability and Transparency Act
FKA	Formally Known As
FOUO	For Official Use Only
FPDS	Federal Procurement Data System
FSC	Federal Supply Codes
FSD	Federal Service Desk
FSN	Fiscal Station Number
FSRS	FFATA Subaward Reporting System
GSA	General Service Administration
HBCU	Historically Black College or University
HSI	Hispanic Servicing Institution
IAE	Integrated Acquisition Environment



Acronym	Acronym Description
IGT	Intra-Governmental Transactions
IPAC	Intra-Governmental Payment and Collection
IRS	Internal Revenue Service
IT	Information Technology
JWOD	Javits Wagner O'Day (JWOD) Act
LLC	Limited Liability Company
MPIN	Marketing Partner Identification Number
NAICS	North American Industry Classification System
NCAGE	North Atlantic Treaty Organization Commercial and Governmental Entity
NHSI	Native Hawaiian Servicing Institution
NKA	Now Known As
NPI	National Provider Identifier
ORCA	Online Representations and Certifications Application
PII	Personally Identifiable Information
PKA	Previously Known As
PMO	Program Management Office
POC	Point of Contact
PPIRS	Past Performance Information Retrieval System
PSC	Product and Service Code
PTAC	Procurement Technical Assistance Center
SAM	System for Award Management
SBA	Small Business Administration
SCR	Service Contract Report
SDB	Small Disadvantaged Business
SFTP	Secured File Transfer Protocol
SSN	Social Security Number
TIN	Taxpayer Identification Number
URL	Universe Resource Locator
WDOL	Wage Determinations Online
WOSB	Women-Owned Small Business
XML	Extensible Markup Language